



HOLIDAY LETTING MARKET INSIGHTS REPORT

2025



COAST & COUNTRY HOLIDAYS

PART OF  SYKES HOLIDAY COTTAGES

Coast & Country Holidays' Market Insights Report 2025

At Coast & Country Holidays, 2024 was another strong season for bookings, despite the current economic climate.

We saw slightly lower overall occupancy rates, due to challenging winter and spring periods with relentless wet weather. However, summer and autumn performance was strong, with an average occupancy of **78% throughout the summer**. Overall, **bookings per property increased by 6%** and **revenue per property increased by 5%** compared to 2023, driven by an increase in customers making multiple short break bookings.

In the past 12 months we have seen some notable changes in the way customers book, their intentions and what they desire from their holidays.

We are delighted to have created this insightful guide, using our own data and statistics from our parent company Sykes Holiday Cottages; we hope it provides useful information on booking trends from both a local and national perspective.

Top performing properties

Here are some of our highest performing properties for 2024:

Figures correct as of 30/12/2024

1 **65**
bookings

Tree House
Oakford
65 bookings in 2024
17 already for 2025

4 **49**
bookings

The Sail Loft
Milford Haven
49 bookings in 2024
8 already for 2025

2 **54**
bookings

Ty Melyn
Aberystwyth
54 bookings in 2024
7 already for 2025

5 **38**
bookings

Gwndwn Gwyn
Goodwick
38 bookings in 2024
13 already for 2024

3 **47**
bookings

Ty Marlyn
Crofty
47 bookings in 2024
12 already for 2025

An overview of the holiday letting market

Firstly, here is an overview of how Coast & Country Holidays performed and the agency's key achievements for 2024:

275
properties



We now have **275 properties** throughout **West, Mid and South Wales**.

6%
increase
B.P.P.*



After a challenging winter and spring, average **occupancy throughout the peak summer holiday period was 78%**. Overall in 2024, bookings per property increased by 6%.

33%
last minute
bookings



33% of our bookings were made **within four weeks** of the holiday start date – a 4% increase from the previous year.

2%
same day
arrival



Lead time for bookings during the summer are decreasing, with **2% of August bookings now being made on the holiday start date**.

48%
short
breaks



48% of our bookings were for **short breaks**. This is a 6.5% increase from 2023.

40%
bookings by
couples



Bookings were made up of **40% couples, 31% families, 27% adult groups and 2% solo travellers**.

11x
British Travel
Awards



As part of Sykes Holiday Cottages, we were thrilled to win **GOLD at the 2024 British Travel Awards**, marking our 11th consecutive win.

Our top tips for optimising your income

Optimise your pricing

In addition to excellent marketing exposure, Coast & Country Holidays offers **dynamic pricing tools**, giving owners the ability to maximise their income as well as booking numbers. We automatically adjust prices in line with demand by analysing searches, booking trends and individual property performance.

Owners that take our advice and utilise our dynamic pricing tools, on average see **6 additional bookings** and **21% more revenue**, compared to properties that do not allow us to reduce their prices.

Similarly, those that take our advice on where their base price should sit, earn on average **42% more revenue** than owners who set their own pricing.

Accept short breaks

We are seeing demand for short stays consistently growing each year.

48%

48% of our bookings in Mid, West and South Wales were for short breaks of three, four or five nights. This is a rise from 42% in 2023.

5.68

Our average length of stay in 2024 was 5.68 nights; a decrease from 6.14 nights the previous year.

Did you know?

Two short breaks in place of one week long booking returns on average **178% of the weekly rental**. Our average short break is currently taken at 88% of the weekly rental price.

Be flexible with last minute bookings

Last minute bookings are now the rule, rather than the exception.

33%

33% of our bookings in Mid, West and South Wales were made within four weeks of the holiday start date. This is a 4% increase from the previous year.

2%

In August, **2% of all our bookings in West, Mid and South Wales** were made between 4pm the day before arrival and 12 noon on the day of the holiday start. Searches for last minute holidays peaked in July and August, and bookings from June onwards had an average of **9% shorter lead time than last year**.

Ensure that your property accepts last minute bookings, and enlist the help of an agency or caretaker if you require support with facilitating last minute changeovers.

Accept pets

We've seen a **60% increase** in searches for pet-friendly holidays since 2019. Properties accepting pets earn on average **2.5 extra bookings and 18% more revenue per year**.

We've also seen an increase in more specific property searches, such as 'dog-friendly cottages in Wales by the sea', 'dog-friendly cottages in Wales with enclosed garden' and 'dog friendly cottages Tenby and Saundersfoot'.

Did you know?

Lead time on bookings generally increases in line with property size. Here in Wales, **40% of bookings for one bedroom properties were made within four weeks of arrival**, whereas only **24% of bookings for four bedroom properties were within four weeks**.

Value adding property features

Here are our most popular search and booking features in 2024:



Hot tubs

Hot tubs are our second most searched-for holiday criteria after pets, and installing a hot tub could **boost your revenue by 37%.**



Garden / outdoor space

32% of guests consider a property's garden or outdoor space when booking a holiday. It's a good idea to have some outdoor seating for guests looking to dine al fresco in the Welsh sunshine!



Wi-Fi / technology

27% of guests consider good Wi-Fi or technology when booking a property.

Other popular property features:

- Pet friendly
- Dishwasher
- Swimming pool
- High chair
- Off-road parking
- Cot
- Open fire
- Ground floor bedroom

Consider sustainability

As well as reducing your running costs and future proofing your business, considering your environmental impact can be a great way to accelerate your bookings.

74% of the UK public say they want travel companies to offer more sustainable choices, 65% would prefer to stay in accommodation if they knew it had sustainable certification, and 43% would be willing to **pay more** for sustainable options.

We have seen an increased demand for properties with EV charge points. Holiday cottages with EV charging facilities receive around **260 searches per month** on Google. With only 5% of our properties currently having an EV charger, this is a great chance for owners to make their accommodation stand out from the crowd.

Thinking of buying a holiday home?

Offering consistently strong occupancy rates from March through to October, Mid, West and South Wales are fantastic regions for those considering investing in a holiday home.

In our experience, our top three features to consider are:



A sea view

Sea views are one of the most common search filters on our website. Customers also include sea views in their specific Google searches, such as 'sea view cottages Wales', 'Tenby self-catering sea view' and 'luxury sea view cottages Pembrokeshire'.



Parking

Tenby and Aberdovey both have particularly high search demand for holiday homes with parking. Parking is another of the most commonly used search filters on our website.



Distance from a beach or town

In our recent study, 34% of people said they consider proximity to a beach when booking a property. Customers also consider their proximity to a shop or supermarket (33%) and pub (25%).

Marketing your holiday home

At Coast & Country Holidays, we're proud to offer owners the 'best of both worlds'; hands on support and local knowledge from here in Wales, combined with the huge national marketing reach of Sykes Cottages. All properties that join us are listed on both the Coast & Country Holidays and Sykes Cottages websites.

Here are some of our marketing insights for 2024, and ways we have secured bookings for our owners:

- We **spent £35 million** on marketing in 2024.
- Our Sykes Holiday Cottages website, which features all of our Coast & Country Holidays properties, had **over 47 million website visitors in 2024**.
- We dominate in Google search results, with a **30% market share amongst the four largest competitors in the industry**.
- More people searched for Sykes Holiday Cottages than any of our competitors in the industry, with **over 3 million searches for 'Sykes' in the last 12 months**.
- We've launched several successful booking initiatives this year, such as **our free cancellation schemes and low deposit payment offer**.
- We're always expanding our wide network of **700+ partner sites, like Airbnb and Booking.com**, giving owners the very best opportunity to be seen across multiple websites and platforms.
- **Our customer app had over 60,000 installs this year**. We're proud to be the only UK holiday cottage brand with a customer app – and even more so because it's rated 4.8 stars on iOS!



We spent a total of £35 million on marketing in 2024



30% market share amongst our four largest competitors



Over 3m searches for the Sykes brand in 2024

Find out more about letting with us

With over 30 years' experience marketing and managing over 275 holiday properties throughout West, Mid and South Wales, we strive to take care of every aspect of the letting process, so you don't have to.

If you'd like to find out more about whether we're a good fit for you and your holiday home, one of our New Property Consultants would love to visit your property and give an honest appraisal of its rental potential. Or, if you are thinking of investing in a property and would like some free advice, we can help.

We are proud to provide:



24-hour support from our local office in Newport, plus a dedicated local Account Manager for your property



Bespoke service options, with full property management available



Unrivalled national and local marketing coverage



Market leading pricing systems



Listings on partner sites include Airbnb, Snaptrip! and Booking.com

Contact us on newowners@welsh-cottgaes.co.uk or call **01239 801587** to book your visit, or to chat with a property expert.

Take note...

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